| ANNUAL PERFORMANCE APPRAISAL CYCLE *(Dates From/To)*: | | **April 1, 2019** | to | **June 30, 2020** |
|---|---|---|---|---|
| **Dept. Name:** | Budget Office | **Employee Name:** | | Lisa Bernard |
| **Dept. #:** | 2320 | **Employee ID:** | 830023596 | **Position #:** 90 |
| **Supervisor Name:** | Duanna Lawrence | **Employee Classification:** | | Accounting Tech |
| **Supervisor Title:** | Interim Assoc. Budget Director | **Competency Level:** | | Journey |

## PART 7: ANNUAL PERFORMANCE APPRAISAL (see instructions on page 2)

- Rate each **Individual** and **Institutional Goal**.
  - 1 = Not Meeting Expectations
  - 2 = Meeting Expectations
  - 3 = Exceeding Expectations
- Multiply the **Weight** by the **Rating** to get the **Score** for each goal. Use two decimal places. **(Example: 10% x 2 = 0.20)**

- Add all of the **Scores** together to assign a **Final Overall Rating**.
  - 1.00 to 1.69 = Not Meeting Expectations
  - 1.70 to 2.69 = Meeting Expectations
  - 2.70 to 3.00 = Exceeding Expectations
- Provide **comments** and **signatures** on the next page.

| # | INSTITUTIONAL GOALS *(see descriptions in performance plan)* | Weight | x | Rating | = | Score |
|---|---|---|---|---|---|---|
| 1 | Expertise | 10 | x | .2 | = | .20 |
| 2 | Accountability | 10 | x | .2 | = | .20 |
| 3 | Customer-Oriented | 10 | x | .3 | = | .30 |
| 4 | Team-Oriented | 10 | x | .2 | = | .20 |
| 5 | Compliance & Integrity | 10 | x | .3 | = | .30 |
| 6 | Supervision *(if applicable)* | | x | | = | |

| # | INDIVIDUAL GOALS *(title only from performance plan)* | Weight | x | Rating | = | Score |
|---|---|---|---|---|---|---|
| 1 | Process PPA Forms, Track Positions, People Admin Processing | 25 | x | .3 | = | .75 |
| 2 | Prepare Quarterly Vacancy Report | 10 | x | .2 | = | .20 |
| 3 | Budget Management | 15 | x | .2 | = | .30 |
| 4 | | | x | | = | |
| 5 | | | x | | = | |

| FINAL OVERALL RATING *(mark the appropriate rating based on total score)* | TOTAL SCORE = | 2.45 |
|---|---|---|

| Has the employee received a disciplinary action during this performance cycle **and/or** received any rating of 1 (Not Meeting Expectations) on this appraisal? If **YES**, then the final overall rating **cannot** equal Exceeding Expectations, regardless of the total score. | YES | |
|---|---|---|
| | NO | **NO** |

| NOT MEETING EXPECTATIONS | | MEETING EXPECTATIONS | **YES** | EXCEEDING EXPECTATIONS | |
|---|---|---|---|---|---|